Page: Entry Information

Chapter

CAI Alabama Chapter

Chapter Size

Medium (261-510)

Category

Chapter Operations and Sustainability

Program Name

Chapter Technology Upgrade

Each question is worth 20 points and will be scored using the following rubric:
(1-5) Poor Didn't effectively answer the question
(6-1) Fair Answered the question
(11-15) Good Answered the question with more detail
(16-20) Excellent Went above and beyond with proven results and visible data

Describe the program and why it fits the category. (20pts)

Our chapter upgraded both our website and accounting system to streamline operations and improve efficiency. The previous website, though functional, was outdated and not optimized for mobile devices, leading to a poor user experience and increased administrative workload, especially during event sign-ups. Additionally, our built-in mailing system required cumbersome formatting for emails and newsletters, taking up valuable time. On the financial side, we were still using an old version of QuickBooks Desktop that was 'free' (now monthly subscription fees) but lacked modern functionality and integration capabilities.

Instead of migrating to an entirely new website/Association Management System (AMS), we decided to stay with our current provider, StarChapter, and pay for an upgrade to their latest version. This upgrade offered better functionality, a more modern look, and improved integration with QuickBooks Online. The new system allowed us to streamline event sign-ups and reduce the manual entry of data, automatically linking website purchases to QuickBooks.

This initiative fits the Chapter Operations and Sustainability category by improving internal operations, reducing administrative burdens, and enhancing the overall member experience. It has also prepared the chapter for future success by integrating modern technology that makes our processes more efficient and transparent.

How did this program meet the mission and vision of the chapter and CAI as a whole including fostering an inclusive environment that reflects and serves our diverse community? (20pts)

The Chapter Technology Upgrade directly supports the growth and sustainability of CAI Alabama by ensuring we stay current with technology. By updating our Association Management System (AMS) / Website and transitioning to QuickBooks Online, we've streamlined key processes, which helps keep our members engaged and operations efficient. Without utilizing these technological advancements, we risk falling behind in member interaction, event registrations, sponsorship tracking, and ultimately incurring higher labor costs due to manual processes.

The upgrade also enhances our financial transparency by integrating our accounting system with the AMS and website. This allows for seamless tracking of ticket sales and sponsorships, ensuring everything is managed and reported transparently.

Just as we promote financial and member communication best practices to our community associations, we believe it's important to lead by example. By adopting these new tools, we're strengthening the chapter's internal operations and positioning ourselves to better serve our members.

What was the impact on the chapter and its members after completing the program? (Growth of membership, financially, public awareness, membership value, better chapter/member relationship, chapter operations, etc.) (20 pts)

The impact of this program on our chapter and its members has been significant in several areas:

• Modernized Website Design:
The new website has a professional look that mirrors the design of CAI National's site, creating a polished and cohesive online presence for the chapter.

• Improved User Experience:
Navigation is much easier, resulting in fewer calls for event sign-ups, especially from less tech-savvy members. More members are able to complete the sign-up process without assistance.

• Efficient Communication:
The built-in newsletter tool allows us to quickly create professional emails with consistent formatting, saving time on design and formatting.

• Streamlined Service Provider Directory:
The directory now automatically updates with new business partner members when the membership roster is uploaded, reducing manual work and ensuring accuracy.

• Enhanced Financial Management with QuickBooks Online:

~ QuickBooks Online eliminates physical copies of files and provides real-time access to financial data for the CED and Board.

~ Linked bank accounts ensure up-to-date financial records.

~ CPAs can easily access financials for tax preparation and reviews, streamlining the process.

~ Online 1099s save time and simplify tax reporting.

• Seamless Integration of Online Purchases:
Tickets and sponsorship purchases made on the website are now automatically pulled into QuickBooks Online, reducing manual entry and simplifying the reconciliation process.

• Simplified Invoicing and Payment Collection:
Sending email invoices is quick and easy, eliminating the need for additional platforms like Square, and streamlining sponsor payment collection.

These improvements have not only enhanced the financial process but also improved the overall member experience, strengthening the chapter's relationship with its members. The time savings lead to cost savings of contract labor on an ongoing basis.

Provide quantifiable data supporting the rationale for success. Include why this data is significant. (20pts)

Our chapter has already seen big improvements in efficiency and time savings for the CED.

1. Time Saved on Accounting:
Entering receipts, sending invoices, reconciling accounts and preparing financial documents used to take hours each month. With QuickBooks Online, this process is now 20-30% quicker. Also, the chapter can now take advantage of the integrated add-on features like 1099 creation, billpay, …

2. Time Saved on Email Formatting:
Formatting emails and newsletters used to take several hours. Now, using the improved built-in tool, it's down to just 30 minutes or less.

3. Fewer Calls for Event Sign-Ups:
We've seen a reduction in calls for event sign-ups with the new website design.

4. Cost Efficiency:

4.1. Website Upgrade: The website upgrade cost was just $700, providing significant value for the improvements.

4.2. QuickBooks Online Transition: We received quotes ranging from $800 to $3000 for the transition of the financial data from QB Desktop to QB Online. With the help of a CPA that is a chapter member, we completed the transition at no charge, saving money.

4.3. Ongoing Costs: The annual AMS/website subscription with StarChapter costs $1,578.72, and the QuickBooks Online Plus subscription is $99 a month, making it very affordable for our chapter.

4.4 Ongoing Savings: There has been an estimated $250/month in labor savings because of reduced event sign-up issues, time saved on accounting and time saved on creating and emailing newsletters.

What are your plans to maintain the momentum of this program moving forward? (20 pts)

Technology will continue to evolve, and we're committed to keeping our systems up to date. We will continue to maintain momentum by

1. Keeping the Website User-Friendly:
We'll keep the website current and user-friendly, ensuring it continues to meet the needs of our members across all devices. As technology evolves, we'll make necessary updates to improve functionality and user experience.

2. Simplifying Accounting and Increasing Transparency:
QuickBooks Online has streamlined accounting, and it'll give us the ability to give access to an account when needed ensuring transparency and smooth financial processes.

3. Ongoing Support for Starchapter and QuickBooks Online:
QuickBooks Online and Starchapter have both excellent customer support, and we'll continue to use it to address any issues or questions that arise to keep everything running smoothly over time.

Supporting documents including flyers, postcards, pictures, videos etc. can be uploaded below. While they aren't required for your submission we certainly encourage it.

Would you like to upload additional documents?

fileUpload1

Download File (https://caiawards.secure-
platform.com/file/20592/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkIjoyMDU5MiwiYWxsb3dOb3RhWduZWRVcmwiOiJGYWxzZSIsImlnbm9
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